University of Washington IT Service Management Board
Recommendations for Services and Campus Consistency
February 26, 2020

Executive Summary

After a two-year hiatus, the Service Management Board (SMB) reconvened in April 2019 with an updated charter[1], a new membership[2], and a re-energized focus. A conversation with Aaron Powell, Vice President and CIO of UW-IT, kicked off the renewed effort with an emphasis on SMB expectations and desired output. Based on that constructive conversation, the SMB proceeded with a principal charge – seek out opportunities to build capacity, both within UW-IT and throughout campus.

For the five months that followed, invited representatives from a wide range of key UW-IT services and projects attended the monthly SMB meetings to present information and answer questions. Lessons learned from those meetings supplied a solid foundation of knowledge for the board and enabled thoughtful consideration and identification of opportunities and challenges across the university's three campuses.

The next phase of the effort called for action with a request to each board member to propose up to three pain points or recommendations to investigate at a deeper level. Members were encouraged to think strategically about needs for new services, the continuation of existing–possibly at risk–services, or gaps in existing IT services. The result was the identification of 23 individual recommendations–each accompanied by a problem statement, possible solution, and anticipated benefit detail–that covered a broad range of process, application, infrastructure, and strategic areas.

To aid in establishing focus areas and prioritizing the long list of recommendations, staff from the UW-IT Organizational Development team facilitated the October and November 2019 meetings. Their work was instrumental in helping the SMB rank the top recommendations and decide which to move forward for publishing. It also uncovered a common theme among the top recommendations; *all of the top items had an underlying need for a cultural shift and a purpose related to driving campus consistency*.

The top seven Service Management Board recommendations are:

1. Enterprise Service Management investment.
2. Standardize and consolidate Admissions applications and review systems.
3. Implement Student Database improvements and application interface.
4. Develop a centralized online software registry.
5. Develop and publish guidance for "pre-qualified" Customer Relationship Management systems.
6. Promote and support the implementation of 25Live for space scheduling and management.
7. Adopt Zoom as the preferred campus-wide solution for video conferencing and collaboration.

With the top recommendations identified, SMB members self-selected into working groups dedicated to composing detailed reports for each recommendation. Below are high-level summary statements from that effort. Presented later are the complete detailed reports for each recommendation.

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[1] IT Service Management Board Charter, https://www.washington.edu/uwit/governance/management/charter/

[2] IT Service Management Board Membership, https://www.washington.edu/uwit/governance/management/membership/

Top Seven Recommendations - Summary Statements

1. **Enterprise Service Management investment[3]**
   Service Management provides a common approach to address inquiries with speed, efficiency, and accountability. Users can obtain help for a question, request a repair, or order something new. The UW Connect Service is now utilized by 25 UW Schools/units including, the Integrated Service Center, Foster School of Business, Health Sciences Shared Service Center, and UW Bothell. Some units use the service to manage local IT support as well as local finance and HR support. Along with this success, there is a recognized need for continuing to advance a UW-wide Service Management approach supported by shared practices, templates, and tools. While there is interest from additional units (e.g., Enrollment Services, Libraries, and others), the cost of the current service is a barrier to adoption. An Enterprise Service Management Investment to minimize this barrier would support scale and repeatable processes and create a common platform facilitating collaboration and service delivery across organizational boundaries.

2. **Standardize and consolidate Admissions applications and review systems**
   The UW has no centralized admissions application and review system for tri-campus use or use by unit-level admissions teams. This has forced many units on campus to create one-off solutions resulting in duplication of effort and expense and missed opportunities for improving the student admissions experience. This recommendation intends to propose moving toward a centralized admissions application and review process. UW Bothell has deployed Slate for undergraduate admissions, and UW Tacoma is in the process of adopting the same solution. Using a common system for all three campuses as well as unit-level needs could, among other benefits, facilitate new data sharing capabilities enabling seamless passing of data – either to college, school or department admission teams, or to the branch campuses – and create a competitive advantage through an improved student experience.

3. **Implement Student Database improvements and programmatic interface**
   Multiple departments at the UW, including a notable percentage of the professional schools, use national consortium applications to their programs. For example, all professional degree, and many graduate degree students apply to the School of Law via the Law School Admissions Council (www.lsac.org). Other professional schools using external systems include the Schools of Business, Dentistry, Medicine, and Pharmacy. There is currently no programmatic way to transfer this application data from these external systems into the UW student database (SDB), or for current students to easily apply to an additional/different major or concurrent degree. To improve the application experience for new and current students and to streamline staff workflows, the recommendation is for UW to implement a system that would allow student data to be programmatically entered into the university's student database (SDB).

4. **Develop a centralized online software registry**
   The procurement and implementation of software technologies, contracts, and agreements occur independently at various levels all over campus. The result is frequent situations where multiple groups explore, negotiate, and procure similar products, often without knowing if any other unit has already done the same work. Development of a lightweight centralized UW-wide online software registry can serve as an internal resource to share and discover the software solutions being used by all tri-campus IT units as well as UW-IT. As the use and adoption of this registry expand, CISO, UW Procurement, and other IT governance bodies stand to benefit by

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[3] This recommendation reiterates and expands upon the top priority of the 2018 Service Management Board recommendations report, explicitly calling for "Different pricing/funding to spread adoption of UW Connect." See: https://www.washington.edu/uwit/governance/management/reports/

getting a more comprehensive view of software investments across all three campuses.

5. **Develop and publish guidance for "pre-qualified" CRM systems**
   Seek to narrow the number of Customer/Constituent Management Systems (CRM) deployed across the UW enterprise by making it easier to pick a pre-qualified vendor already in production or development. The purpose is not to prevent a UW unit from selecting a given CRM vendor. Instead, it seeks to make it easier to choose a vendor that has already demonstrated compliance with an array of criteria for at least one other UW unit.

6. **Promote and support the implementation of 25Live for space scheduling and management**
   25Live is a web-based room-assignment/event-management system overseen by the Office of the University Registrar (OUR) at UW-Seattle. It is already licensed and available for use by all three campuses, but a lack of campus awareness hinders adoption. This recommendation intends to support the promotion and oversight of a full-University implementation of the software, not only with managing classroom space but with non-instructional space as well. Implementing 25Live will improve efficiency at multiple levels in multiple offices across all three campuses. Instead of a chaotic playing field, it provides a single source for scheduling/room-assignment needs. Additionally, it can reduce the cost spent by multiple offices implementing multiple solutions. UW-Tacoma has already seen that happen with a nearly complete implementation across its campus. By implementing 25Live as an enterprise-wide solution, users looking for spaces could find them in a single online location without having to search all around campus.

7. **Adopt Zoom as the preferred campus-wide solution for video conferencing and collaboration**
   The intent is to stress the value of and the need for a funded and supported campus-wide solution for video conferencing and collaboration that has a robust feature set, is easy to use, and is compatible with a wide range of devices and platforms. Zoom Pro is widely used at the UW, but generally only by departments who can afford the monthly license cost. A funded campus-wide solution would enable new creative opportunities for business and academic collaboration, learning technologies, business continuity, and more. Zoom's ease of use, interoperability, and current footprint on campus, removes significant barriers for successful adoption and implementation.

Conclusion

Each of these recommendations has the support of the full board whose members represent multiple colleges, schools, and units throughout the tri-campus. Criteria for evaluation included feasibility, operational efficiency, strategy, resource efficiency, consistency, and customer experience. The board recognizes that some are actionable in the near term, while others are to be informative in a longer-term strategic context. All have the potential to create capacity by way of continued cultural shift and improved campus consistency.

Appendix A:

Top Seven Recommendations – Full Report Detail

1. Enterprise Service Management investment

Recommendation: Service Management provides a common approach to address inquiries with speed, efficiency, and accountability. Users can obtain help for a question, request a repair, or order something new. A tri-campus approach to Service Management would improve efficiency, effectiveness, and provide a consistent customer experience across the enterprise. To position us for success, we recommend the following:

- Create Service Management standards, best practices, and templates for use in adoption and implementation.
- Standardize on an Enterprise Service Management platform.
- Fund (fully or partially) an Enterprise Service Management Service, on an opt-in basis, to encourage UW-wide efficiencies and effectiveness.

Summary: The University of Washington is highly distributed, which increases local autonomy and specialization, yet often results in duplication of effort, inefficiencies, and lack of shared standards, processes, and best practices. This creates complexities for customers across the organization in finding and obtaining support for services and makes it difficult for service providers to collaborate across organizational boundaries to efficiently serve students, faculty, staff, and other constituents.

More specifically, because we lack a shared approach and platform, it is difficult for customers (e.g., Students, Faculty, Staff, Alumni, and other constituencies) to determine the correct path for obtaining support; if a customer chooses the wrong path, they are 'closed' out of one system, and have to start over by re-initiating a request with the correct unit which creates frustration and inefficiencies.

The ServiceNow platform has been in production since July 2014, and the UW Connect Service is now utilized by 25 UW Schools/units, including the Integrated Service Center, Foster School of Business, Health Sciences Shared Service Center, and UW Bothell. Some units use the service to manage local IT support as well as local finance and HR support. Along with this success, there is a recognized need for continuing to advance a UW-wide Service Management approach supported by shared practices, templates, and tools. While there is interest from additional units (e.g., Enrollment Services, Libraries, and others), the cost of the current service is a barrier to adoption.

An Enterprise Service Management Investment would support scale and repeatable processes and create a common platform facilitating collaboration and service delivery across organizational boundaries. Supplemental funding is needed to enable more units to adopt this common framework, further positioning the University toward a more customer-centered and efficient approach for service delivery. This recommendation leverages our existing institutional investment (i.e., platform and expertise), is in alignment with strategic priorities, and complementary to the University's approach for Finance Transformation and HR/Payroll Modernization.

Goals of the Recommendation:
- Enhance business capabilities by developing a UW Service Management Framework to include standards, best practices, training, and templates for adoption and implementation across UW.
- Simplify the customer experience through a consistent Enterprise Service Management Service, and the ability to deliver services across organizational boundaries.

- Incentivize behavior by funding (fully or partially) an Enterprise Service Management Service to facilitate UW-wide efficiencies and effectiveness.

Value Proposition:
- Productivity:
  - Standardized business practices create a common vocabulary and approach.
- Data-driven approach:
  - Consistent metrics for reporting, tracking, and customer satisfaction.
  - Promotes opportunities for continual improvement.
- Capacity Gains:
  - Adopting a common, shared framework and platform reduces redundant systems and processes, creating capacity so that staff can be repositioned to focus on higher-value work.
- Customer Experience:
  - Consistent customer experience across the University when interacting with various Schools/departments (e.g., ISC, FT, UW-IT, local IT). As one example, when on the same platform, customers can check the status of any request for any unit on one web page. Further, questions can be moved within the system rather than asking the customer to re-submit their question to a different support organization. When organizations adopt the standard service, they are then eligible to subscribe to the Enterprise Service Desk service because they are on the same platform, which can improve support and routing overall.

Implementation Considerations:
- Bolster UW-IT staffing for assessment, adoption, and implementation.
- Identify funding sources to offset unit costs for adoption while developing a sustainable funding (and support) model for the Enterprise Service Management Service.
- Consider opportunities for campus units to partner with UW-IT and contribute their expertise to move the University forward in achieving our Enterprise Service Management outcomes.
- The Enterprise Service Management Investment recommendation could be a phased implementation; strengthen services and support via standards, best practices, and templates, while phasing in units ready to adopt the service.

Measuring Success:
- Increased adoption of Service Management Service (framework and platform).
- Creation of templates, processes, and best practice documentation.
- Standard reports for service delivery, performance measures, and trends. Examples could include:
  - First call resolution
  - Time to response
  - Ticket volume (day, week, month)

2. Standardize and consolidate Admissions applications and review systems

Recommendation: Provide a centralized Admissions Application and Review Service. Facilitate data sharing. Drive consolidation of similar systems across campus, and create or empower a single data governance team to ensure admissions data is consistent and of high quality.

Detailed Summary: Today, UW has no central admissions application and review system for either the tri-campus or the unit-level admissions teams. Many units across campus have created their own solutions causing duplication of effort and expense. The current state does not put the student at the

center and makes it difficult to offer admission at Bothell or Tacoma to students denied admission at Seattle. A lack of data sharing capabilities (through interfaces or other methods) makes passing the information we do have—either to college, school, or department admission teams or to the branch campuses—unnecessarily difficult.

UW Bothell has deployed Slate for undergraduate admissions. UW Tacoma is in the process of adopting the same solution. Encourage Seattle to examine the Slate software to determine if we can get to a single solution for undergraduate admissions at the three campuses. Recognizing that data requirements will be different, explore this solution for graduate admissions, as well.

Identify systems currently in use/development at UW, and then—similar to our software registry proposal—identify contact persons at each unit, institutional integration points, and opportunities for shared licensing or cost-sharing, communities of practice, etc. This should include a review of vendor's security posture by Chief Information Security Office (CISO), whether a Personal Data Processing Agreement (PDPA) has been completed, whether an InCommon or other NetID Single Sign-On implementation has been done, whether the system can accept authorization via UW Groups, etc.

Value Proposition: Deploying a single system for all three campuses should allow us to realize institution-wide efficiencies, among them:
- A Student-centric system reduces the effort required by a student to apply at more than one UW campus. Eliminates re-entry of core admissions decision data.
- Fewer platforms deployed around the admissions process.
- Reduced overhead from separate integrations.
- Reduced workload for support groups such as Identity and Access Management (IAM), Chief Information Security Officer (CISO), Office of Privacy, Registrar's Office, Office of Disability Services, and others.

Risks:
- Would require buy-in and executive sponsorship from UW Seattle, since the other two campuses are already moving that direction.
- It is unclear if the same system could be used for unit-level admission to major, though that would certainly make sense. However, it would require considerably more effort to address the admission needs of various schools and colleges. Beyond the application itself, review processes would need to either be standardized or configured for each program. However, even the ability to pass applicant demographic data in a consistent way would be an improvement.
- As admissions data is sensitive, appropriate access controls would be required. Student approval should be obtained before review by programs other than the one to which the student applied.
- While the focus of this proposal is undergraduate admissions, explore if Graduate School admissions could also use a common system.
    - Conditional logic or separate supplementary questions may need to be asked for each different program. The Graduate School is already engaged in exploring options.
    - Consortium applications such as those used in Business, Law, Nursing, and others would need to be accommodated via data import.

3. Implement Student Database improvements and application interface

Recommendation: In order to improve the admissions experience for new and current students and to streamline staff workflows, a system that allows student data to be programmatically entered into the university's student database (SDB) is recommended. This could be implemented either as a system enhancement to SDB or a supplemental service such as an application programming interface (API) or

web service. At a minimum, this would include student application data that has been downloaded from an external system and normalized to match UW application data standards, but which could also include application data maintained by current students, grading data maintained by registrars, etc.

Detailed Summary: Multiple departments at the UW, including a notable percentage of the professional schools, use national consortium applications to their programs. For example, all professional degree, and many graduate degree students apply to the School of Law via the Law School Admissions Council (www.lsac.org). Other professional schools using external systems include the Schools of Business, Dentistry, Medicine, and Pharmacy. There is currently no programmatic way for this application data to be transferred from these outside systems into the UW student database (SDB), or for current students to easily apply to an additional/different major or concurrent degree.

Some progress has been made toward implementing an API that would at least partially address this need, including an active P1/P2 project in UW-IT requested by the Graduate School, but a more comprehensive solution does not yet exist. As a result, new applicants either need to re-apply directly to the UW—using the Graduate School's MyGrad portal for a graduate degree, for example—or staff at the school or department level need to manually enter each application into the appropriate UW system. Existing students who want to make a change, perhaps to a different major, as one example, often need to re-enter their application information. These approaches result in application data errors, slow application processing times, and skewed UW application statistics.

Goal of the Recommendation:
- Improvements to the SDB or implementation of a supplemental service, either to include an API such as a web service, that would allow student data to be programmatically entered into the UW SDB.

Value Proposition:
- Provides a better application experience for students, both external and internal, attracting more applicants and competing more effectively for those potential students.
- Reduce staff time on manual SDB data entry tasks (application data, grades, etc.).
    - It also reduces potential errors in this data that can arise from manual entry processes.
- Reduce approximately 20 different application systems used across the UW, as well as other manual SDB data entry processes such as grade entry by the Registrar's Office, to a single, programmatic data entry point.
- More complete application data in the SDB will be accessible in the Enterprise Data Warehouse (EDW) and BI Portal, allowing for application data transparency and better communication with all students applying to various programs/degrees.

Risks / Challenges:
- UW schools that use national systems for applications can be placed at a disadvantage against outside schools if our participation is not as seamless as others, which can lead to the loss of potential students.
- Reputational damage as students are forced to deal with our aging application infrastructure.
- Manual data entry processes lead to inefficient use of staff time, potential data errors, and incomplete data for statistics and reports (for example, when only applications for admitted students are entered to save time and effort).
- As University budgets decline, having to continue to hire and train individuals to manually enter data into the SDB is expensive and time-consuming.
    - Such manual data entry tasks are also unappealing and make it harder to fill positions that require them.

Implementation Considerations:
- Preliminary discussions with UW-IT and the Graduate School suggest this project is possible.
  - The Graduate School has an active P1/P2 project with UW-IT related to aspects of this proposal.
- Data, particularly student application data, needs to meet UW standards as well as work with the legacy UW SDB system.
- An API and underlying changes would need to be maintained.
- Support would be needed in each department using the new system to develop and maintain the middleware that transfers application data from/to external systems.

Measuring Success:
- Better customer experience for potential students leading to an increased number of applications, particularly to professional schools that use external application systems.
- Better customer experience for existing students who:
  - Apply to/move between resource-constrained majors.
  - Enroll in concurrent professional/graduate degree programs.
- Reduced staff time spent on manual data entry.
- Reduced errors in data.
- Improved SDB data and statistical reports involving applications (e.g. reports include *all* applications to programs, not just admits).
  - Data entered in the SDB becomes available via the EDW to feed reports, statistics, BI Portal reports, etc.

4. Develop a centralized online software registry

Recommendation: Develop a "simple" centralized UW-wide online software registry that serves as an internal resource to share and discover the software solutions (outside of UWare) being used by all tri-campus IT units as well as UW-IT. This registry would aim to catalog already adopted SaaS agreements/contracts, as well as locally hosted software packages that are working well and having a positive impact on improving business processes. Both UW-IT and campus IT units will benefit significantly through increased knowledge sharing. As the use and adoption of this registry expand, CISO, UW Procurement, and other IT governance bodies stand to benefit by getting a more comprehensive view of software investments across all three campuses.

Detailed Summary: Software technologies, contracts, and agreements are being procured and implemented independently all over campus at various levels. The assumption is that there are many occasions where multiple groups are duplicating effort exploring, negotiating, and purchasing individually without knowing if any other unit has ever done the same work, and failed or succeeded at it already. Researching production or prospective software solutions currently involves arcanely searching for product names across UW websites (including UWare/ITConnect), within TechSupport archives, or emailing CISO or Procurement to ask "Has anyone ever…?". This lack of knowledge transfer is inefficient and costing the University time, money, and energy.

The registry would contain the following types of data:
- Software title/SaaS vendor name.
- Date acquired.
- Category (what business need does the software solve; i.e., ticketing, CRM, document management, image or video processing software, EdTech, scientific modeling, or engineering tools, etc.).
- # of licenses or type of license in use (i.e., department/campus/U-wide license?).

- Whether there is a current, signed PDPA, DSPA, or other negotiated agreement.
- Is the vendor in Ariba?
- Negotiated price per unit, or volume agreement price. Is the price fixed for EDU, or are their tiered pricing discounts in use increases.
- List campus unit(s) currently using the software (Including unit IT contacts).
- List of campus units interested/exploring purchasing?
- Cost and # of associated licensed sub-packages or modules of the product in use, if any. (i.e., Qualtrics)
- Was the software purchased directly from a vendor or through a reseller? Add the contact information of the vendor representative.
- UW Accessibility Office rating for the product (if such exists).

With the successful implementation of such a registry, UW-IT leadership, CISO, and Procurement will have a much better view of what software is in use. It will also show how widespread adoption is for different software solutions, as well as how many different software solutions are in use to solve similar business processes.

Goals of the Recommendation:
- Design and deploy a software/SaaS registry (Define data types, categories, ability to look back at history, metrics, drop-down menu constraints, etc.).
- Invite a few large campus IT units to initially input their data and provide feedback on the interface.
- Identify and correct bugs or UI improvements, and promote to broader campus IT community.
- Regularly promote the use and longer-term adoption by campus IT units

Value Proposition:
- Enables information sharing, collaboration, and economies of scale between IT units.
- Informs CISO, Procurement, and IT governance on where IT investments are being made.
- Helps all parties to identify vendors with completed risk assessments.
- Potential to align disparate software investments through knowledge sharing.
- Potential for cost-saving opportunities as units collectively can come together and negotiate larger volume pricing contracts.

Risks/Challenges:
Development and Launch period:
- Overall, we believe this project would be Low Risk in terms of; cost to design, implement and host an initial online registry, and Low Risk in terms of data security/sharing of information (as much of the data is already public information).
- Potential confusion by end-users over what types of software solutions should be registered.

Longer-term risks to success:
- Risk of low adoption if not designed for ease of use, a simple user interface (UI), and a search mechanism.
- Risk of reduced ongoing use and updates if not promoted with some frequency.
- Data in the registry becomes stale if stakeholders don't update with some regularity.
- Data becomes fragmented, unusable over time if not managed. Need for a data steward to normalize data, such that software solutions are consistently named and categorized.

Implementation Considerations:
- Should this also include the ability to log homegrown apps that are attempting to solve business problems? (ie. "Should I register our homegrown admissions tool?")

- What is the smallest unit of measure that meets the criteria for listing in the registry? (i.e., "we maintain five licenses of this obscure piece of software")
- Who should have access to submit/edit data?
- What parties should be charged with maintaining the registry and acting as the data steward?

Measuring Success:
- First phase successes could be measured by how many campus IT units participate and successfully upload software data.
- Longer-term, measuring how frequently users refresh, update, or add new products to the registry, provides useful data for tracking success.

5. Develop and publish guidance for "pre-qualified" Customer Relationship Management systems

Recommendation: Seek to narrow the number of Customer/Constituent Relationship Management (CRM) systems deployed across the UW enterprise by making it easier to pick a pre-qualified vendor already in production and/or development. Nothing about the proposal is meant to prevent a UW unit from selecting a given CRM vendor; rather, it seeks to make it easier to select a vendor that has already demonstrated compliance with an array of criteria for at least one other UW unit.

Detailed Summary: When you say 'CRM,' you get different answers about what business needs that addresses, based on who is asking the question. For UW-IT, CRM may mean their internal customers, while in the academic units, it may mean prospective or current students and alumni, friends, and donors to Advancement. For this reason, it is unlikely a single solution will address all needs for CRM at the University of Washington.

Still, many units at UW are in various stages of development on a CRM system. Some UW units, including the Burke Museum, Continuum College, and Intercollegiate Athletics, are already in production. A few, like UW Advancement and the Foster School, have selected a product but are still in the development state. Others, including the Graduate School, have identified the need for CRM to either replace/augment a current system or, in some cases, meet a new need. Finally, some units have selected a system that addresses one portion of the CRM lifecycle, and purchased a system to address that need. Slate for undergraduate admissions at UW Bothell and UW Tacoma is one such example. As the number of planned CRM deployments continues to grow, so does the sum of the effort units are putting into searching for the right solution.

Thus, we believe now is the time to create a list of pre-qualified vendors in this space. UW's resources for review of these projects are constrained by the review process that is rightfully required for the often highly sensitive data we entrust to these systems. Staff resources deployed at CISO, Identity and Access Management, Office of Privacy, Access Technology Center, and Procurement are limited. Therefore, we suggest guiding those considering a CRM deployment by creating a database or repository to identify systems already in production and/or development at UW. CRM vendors, UW Procurement, and/or UW-IT Project Review team can likely assist in the initial population. The database should identify:
- Unit-level contact persons.
- Institutional integration points.
- Opportunities for shared licensing or cost-sharing.
- Office of Privacy review status: Has a Personal Data Privacy Agreement (PDPA) been completed?
- CISO review status: Have the vendor's contract terms been reviewed for security posture?

- Identity and Access Management integration status: Has an InCommon or other NetID single sign-on (SSO) implementation has been done? Can the system accept authorization via UW Groups?
- Access Technology Center (ATC) review: Is the product demonstrably accessible? In what areas does it require remediation or additional work by units deploying it?
- Existing or desired communities of practice, etc.

Goals of the Recommendation:
- Knowing what we currently have and who is working on it may lead to institution-wide efficiencies in terms of platforms deployed, reduced overhead from separate integrations, reduced workload for offices providing institutional review.

Implementation Considerations:
- UW CIO already has oversight of projects over $50K, but currently, they only have visibility via Procurement cost. If FTE are required, those costs may not be visible in project cost today, except when contractors are hired directly related to a project. Is there a way to identify and attribute these costs to make project review more likely?
- Who will author it? While some data could be self-reported by units, it would likely be helpful to have input from subject-matter experts such as ATC, CISO, IAM, and Privacy. Maintaining such a list may lead to fewer 'one-off' implementations.
- Who will maintain it or keep it relevant?
- Data normalization - ensuring SaaS services/application names and categories (tags that relate to function) are appropriately sorted to minimize duplication and prevent bad input/sorting of metadata.

Risks:
The greatest risk may be to do nothing. By failing to narrow the field, we may:
- Further constrain already taxed resources at ATC, CISO, IAM, Office of Privacy, and Procurement; increasing the time required for review and acceptance.
- Obtain inefficient and/or more expensive licensing terms by having a small number of licenses for many different platforms, rather than negotiated terms for at least a small number of highly qualified vendors who have demonstrated ability to meet our terms and conditions around accessibility, procurement, privacy, security, and identity.
- In the same way, inhibit the institutional maturity of our own teams around these products and encouraging them to find peers/communities with whom they can share and learn.

6. Promote and support the implementation of 25Live for space scheduling and management

Recommendation: 25Live is a web-based room-assignment/event-management system overseen by the Office of the University Registrar (OUR) at UW-Seattle. It is already licensed and available for use by all three campuses, but a lack of campus awareness hinders adoption. This recommendation intends to support the promotion and oversight of a full-University implementation of the software, not only with managing classroom space but with non-instructional space as well. Implementing 25Live will improve efficiency at multiple levels in multiple offices across all three campuses. Instead of a chaotic playing field, it provides a single source for scheduling/room-assignment needs.

Additionally, it can reduce the cost spent by multiple offices implementing multiple solutions. UW-Tacoma has already seen that happen with a nearly complete implementation across its campus. By implementing 25Live as an enterprise-wide solution, users looking for spaces could find them in a single online location without having to search all around campus.

Detailed Summary: The University has partnered with CollegeNet since the mid-eighties when we became one of their first institutional partners to utilize the software for classroom scheduling management and maximization of efficient scheduling. In 2018, we moved from a server-based tool called R25, which was being used by Time Schedule coordinators throughout all three campuses, to a cloud-based web product called 25Live.

The licensing fees for 25Live with CollegeNet are currently paid for by the Office of the University Registrar, UW-Seattle (50%), Enrollment Services, UW-Bothell (25%), and the Registrar's Office, UW-Tacoma (25%). UW-IT is not involved in the upgrades, maintenance, or management of the software, which is overseen by two FTE in the Office of the University Registrar, UW-Seattle.

The software provides capabilities for room reservations, including financial transaction mechanisms, and it could be used far beyond what we are currently doing at UW-Tacoma, UW-Bothell, UW-Seattle, and in Health Sciences. 25Live allows schedulers to maximize room utilization, which creates more spaces for instructional and institutional use. The self-service tools will enable students and others to identify desired space and sign up for it, even pay for rental spaces, without having to involve staff in the process. Each office that schedules spaces can also determine who can see their spaces, so it allows great flexibility to individual space holders to extend requesting/scheduling rights.

The intention with this recommendation to UW-IT leadership is to support the continuing university-wide implementation of the software, not only with managing classroom space, but non-instructional space, as well. With the creation of a 25Live Advisory Council, staffed and coordinated by the 25Live Functional Administrator in the Office of the University Registrar, UW-Seattle, we hope to standardize security class assignments, the general use of the tool, and to facilitate our plans for continued expansion.

Goals of the Recommendation:
- Currently, the four main entities utilizing 25Live for scheduling are all at very different stages with using the software. Ultimately, we envision all four entities using 25Live in a fully implemented manner.
- Support for the creation of a 25Live Advisory Board, staff and chaired by the 25Live Functional Administrator, UW-Seattle Office of the University Registrar
- Support for creating and establishing database standards so that individual units and departments can use the tool for internal, non-classroom/instructional space scheduling.
- Potential for UW-Seattle non-instructional space scheduling to be managed within UW-IT.
- Allow units that have created systems for room management to become aware of the functionality within 25Live and ultimately to cut over to 25Live and to deprecate redundant systems and tools.
- We want to support the deprecation of individual software solutions, like Microsoft Excel and other tools for scheduling, and move to the full University utilizing 25Live.

Value Proposition:
- Advisory Board would provide governance over the use of the 25 Live tool to insure that while individuals can customize the tool, that we are standardizing central functionality for training and use efficiencies. This would address the siloed practices as it relates to space management.
- Allowing individual units and departments to be trained and to use the tool for departmental space will provide consistency for those needing to schedule rooms and will help units move away from arduous scheduling such as Microsoft Excel.
- Once UW-Seattle is ready to provide for Registered Student Organizations and other entities to be able to self-serve with scheduling spaces for non-instructional use, having UW-IT oversee and manage this will allow this to be feasible.

Risks:
- Duplication of processes and maintenance of multiple separate systems to manager room reservations and assignments and not being transparent on space utilization.
- To not embrace this could continue to support hiding space and not maximizing space utilization.

Suggested Implementation Process:
- Office of the University Registrar, UW-Seattle to identify 25Live Advisory Board membership.
- Creation of database standards and best practices for use for non-instructional/classroom scheduling.
- Training of departments and units to use 25Live for non-instructional/classroom scheduling.
- Decision by UW-Seattle to begin using 25Live for non-instructional/classroom scheduling and to be overseen and managed by UW-IT.

Measuring Success:
- A fully operating Advisory Board for the management of the 25Live tool.
- All four entities have fully implemented 25Live, and we are using this for all classroom and non-classroom scheduling.
- We will continue to explore additional functionality, such as payment for room reservations using 25Live to create efficiencies with current scheduling operations.
- Individual units and departments can use the tool to schedule non-instruction space.
- Ultimately, we envision entities such as Facilities, UW Police Department, and potentially the Arts using it as scheduling and space management tool.

7. Adopt Zoom as the preferred campus-wide solution for video conferencing and collaboration

Recommendation: Adopt Zoom as the preferred campus-wide solution for video conferencing and collaboration through the procurement of a Zoom Pro Enterprise license. Zoom Pro is widely used at the UW, but generally only by departments who can afford the monthly license cost. A funded campus-wide solution would enable new creative opportunities for business and academic collaboration, learning technologies, business continuity, and more. Zoom's ease of use, interoperability, and current footprint on campus, removes significant barriers for successful adoption and implementation.

Detailed Summary: The objective of this recommendation is to stress the value of and the need for a funded and supported campus-wide solution for video conferencing and collaboration that has a robust feature set, is easy to use, and is compatible with a wide range of devices and platforms.

Video conferencing is a key communication and collaboration tool, allowing people in different locations to hold face-to-face meetings without having to come together in a single location. As the nature of higher education and the modern distributed workforce continue to evolve, video conferencing tools help to facilitate a feeling of connection while reducing the need for travel and allowing our faculty, students, and staff to meet and collaborate in creative and productive ways.

With faculty, students, and staff located throughout the Pacific Northwest and far beyond, many groups at the University of Washington have independently leveraged a variety of video conferencing solutions to meet their needs. This independent procurement and implementation is inefficient and results in duplication of a variety of efforts along with missed opportunities to take advantage of potential savings gained through larger group purchases.

We resolutely support Zoom as the preferred solution to meet the UW's needs and recommend UW-IT lead the effort to fund and implement a Zoom Pro Enterprise license. Zoom is a proven video conferencing and collaboration solution for live class sessions, project meetings, job interviews, guest presentations, office hours, thesis committees, business continuity, and more. It is the accepted solution at many of our peer institutions, and Gartner ranks it as a leader in the field because of its consistent service, reliability, and video quality.

Zoom has a robust feature set, is easy to use, and works well on a wide variety of devices and platforms. It is already in wide use on campus with an installed base of more than 3,700 individuals subscribed and using the product. The Zoom Pro Enterprise license will eliminate the need for those individual subscriptions and expand the licensed coverage to all faculty, students, and staff on all three campuses and UW Medicine.

Funding and execution of a Zoom Pro Enterprise license encourages standardization and consistency throughout the university and allows everyone equal access to a robust collaboration tool. Implementation overhead is expected to be low, and the likelihood of success is high since we can leverage the extensive knowledge and experience that already exists at the UW. For these reasons and the fact that this recommendation aligns directly with UW-IT's strategic goals, we recommend moving forward with the procurement and support of a Zoom Pro Enterprise license.

Goals of the Recommendation:
- Adopt and promote Zoom as the preferred multi-campus solution for video conferencing and collaboration.
- Leverage existing knowledge and experience acquired as a result of the extensive decentralized Zoom implementation that is currently present at the UW.
- Remove barriers for continued adoption through the purchase and implementation of a Zoom enterprise license.

Value Proposition:
- Alignment with UW-IT Strategic Goals - Enables Innovation in Teaching and Learning. Enhances Collaboration. Reduces Enterprise Risk.
- Centralized Management - Integration with UW NetID. Simple hassle-free experience for video collaboration. Simplified licensing. Ease of account provisioning.
- Increased adoption of a common platform strengthens collaboration and lowers cost through improved efficiency and reduced support needs.
- Solution consolidation – Consolidation provides consistency across the organization and gives IT teams just one solution to support.
- Reduced travel – UW has physical locations throughout Seattle, Bothell, Tacoma, and beyond. As familiarity and comfort with a single unified communications platform increases, people will have less of a need to travel for meetings.
- Existing hardware support – Zoom can be run on existing devices and room hardware, reducing the need for new hardware investment.
- Ease of use – Less time spent trying to set up and configure. An easy click to join reduces frustration and headaches for everyone, both internal and external.
- Allows flexibility – The Zoom mobile app for iOS and Android improves availability and flexibility.

Implementation Considerations:
- Identifying funding sources and how/if to incorporate existing departmental spend.
- Will require some percentage of an FTE and student labor to the Learning Technologies group to deal with the additional support costs.

- Requires users who are willing to embrace new solutions and technology experts who can guide users in logistics and troubleshooting.
- Prepare to answer the question, why not Teams or other product.

Measuring Success:
- Increased Zoom account enrollment and usage.
- Maintaining low overhead for license management and support.
- Ease of account provisioning.
- Improved communication and collaboration.
- Reduced time spent traveling.

Appendix B:

Recommendation Reports - Working Group Members

SMB members self-selected into the following working groups dedicated to composing each individual recommendation report.

Enterprise Service Management investment
- Christy Long, Assistant Vice Chancellor for IT and Chief Information Officer, UW Bothell
- Tiffany Quatmann, Computing Services Manager, Health Sciences Administration
- Jennifer Ward, Director, UW Libraries
- Amy Stutesman, Administrator, UW Bothell

Implement Student Database improvements and application interface, and
Promote and support implementation of 25Live for space scheduling and management
- Helen Garrett, University Registrar and Chief Officer, Enrollment Services
- Thayer York, Director of Technology Services, School of Law
- Bob Ennes, Director, Finance & Administration, Health Sciences Administration
- Paul Miller, Administrator, Chemistry

Develop and publish guidance for "pre-qualified" Customer Relationship Management systems, and
Develop centralized online software registry
- Aaron Timss, Director, Department Computing, Computer Science and Engineering
- Mick Westrick, Director of IT, School of Business
- Michael Secright, Chief Information Officer, Housing and Food Services
- Frank Barber, Assistant Dean, School of Nursing

Standardize and consolidate Admissions applications and review systems, and
Adopt Zoom as the preferred campus-wide solution for video conferencing and collaboration
- Mick Westrick, Director of IT, School of Business
- Patrick Pow, Vice Chancellor for Information Technology, UW Tacoma
- Michael Middlebrooks, Director of Information Technology, School of Medicine
- Barbara Wingerson, Associate Vice President, UW Facilities

Additional UW-IT information and context support provided by:
- *Karalee Woody, UW-IT sponsor*
- *Mary Mulvihill, UW-IT Service Management consultant*